

## EMPLOYEE REVIEW FOR ITEMS THAT AFFECT THE W-2

*Employee review of items affecting year-end processing is very important. It allows for the correct reporting of year-end forms, it prevents the employee from needing and waiting on a W-2C, it prevents possible fines from the IRS for missing information and it prevents incorrect state taxation due to a wrong address.*

*Employees should periodically review the below information in Workday and make changes any time before the last payroll in December:*

### **Social Security Number (SSN):**

*Please verify your Social Security number (SSN) in Workday to ensure an SSN is entered and matches your SSN card exactly. For step-by-step instructions on verifying your Social Security number, please consult the Workday job aid. Reasons why doing this is important:*

- The Social Security Administration (SSA) will not be able to post your W-2 earnings to your SSA account if an SSN is not included on your W-2 or the SSN on the W-2 is incorrect.*
- The Internal Revenue Service (IRS) can fine you (the employee) for not having an SSN listed on the W-2.*

*To avoid either of the above, please review your SSN in Workday immediately.*

*An alternate way to verify your SSN is to review the SSN on a prior W-2 form:*

- 1. Log into Single Sign On (SSO) at [sso.tamus.edu](https://sso.tamus.edu) using your UIN and password.*
- 2. Click the Workday option.*
- 3. Click the "Pay" Worklet on the employee dashboard.*
- 4. In the "View" box click on "My Tax Documents".*
- 5. Your W-2 will be listed on the next page for you to view. You can also print if needed*

### **State/Local Income Tax:**

*State/Local income tax is deducted based on your residency and/or work location address in Workday. If you have a residence address or work location address outside of Texas and within a state that levies an income tax, review your pay slips to ensure the state tax deduction was correct. If you feel the state tax deduction is incorrect, please complete and submit the Employee SIT Verification Form <https://uas.tamu.edu/tax/resources/state-local-income-tax.html>.*

*Both State and Local income tax are reported on the W-2; therefore, it's important to review your deductions periodically.*

### **Address:**

Please review your mailing address in Workday. This is the address your W-2 will be mailed to if you have not selected to receive it electronically. A corrected W-2 **cannot** be provided for an incorrect address.

## **W-2 Delivery Format:**

Please consider electing to receive your W-2 in the electronic format. By electing to receive an electronic W-2, you gain the **AGS** ADVANTAGES:

### **Why Choose the Electronic W-2!**

Did you know an Electronic W-2 is an IRS approved document?

We **STRONGLY** encourage selecting the electronic format to get the **AGS** advantages:

- A**CCESS:      Quicker Access!  
Electronic W-2s are available as early as mid-January.
- G**REEN:        Go Green!  
Natural resources are saved by not printing & mailing W-2 forms.
- S**ecurity:      Increased Security!  
Mail delivery allows access to your personal sensitive information.
- S**avings:        There is a cost savings for each form not printed and mailed.

### **HERE'S HOW YOU SIGN UP:**

- Click on the Pay worklet on your Workday Home page
- Click on the My Tax Documents link
- Click the Edit button in the Printing Election column
- Select the radio button for "Receive electronic copy of my Year End Tax Documents."
- Click OK

That's all there is to it. You will begin receiving your W-2 electronically instead of a paper form once available in the new year.

## **SSO Log-On Issues:**

If you experience difficulty logging into SSO, follow the on-screen help or send an email to Payroll Services at [payroll@tamu.edu](mailto:payroll@tamu.edu) to have your password reset. Please provide your name, the last four digits of your Social Security Number, your date of birth and your current email address for verification. An automated email will be sent to you with the new password.

## **Questions**

- Email Tax Compliance & Reporting at [tax@tamu.edu](mailto:tax@tamu.edu) for questions about your **taxes**.
- Email the Payroll Office at [payroll@tamu.edu](mailto:payroll@tamu.edu) for other payroll questions.
- Email Human Resources at [benefits@tamu.edu](mailto:benefits@tamu.edu) for questions about benefit issues.